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<u>Number</u>	<u>Percentage Contributing</u>	<u>Number</u>	<u>Average Gift</u>	<u>Total</u>
16,000	50	8,000	200	\$1,600,000
E. <u>Non-Graduates.</u>				
16,000	25	4,000	100	400,000
F. <u>Rush Alumni</u>				
5,000	10	500	50	<u>25,000</u>
TOTAL GIFTS - INSIDE PROSPECTS				\$6,185,000

2. Outside.

A. Foundations.

General Education Board (Medical Project)	1,500,000
Rockefeller Foundation (Medical Project)	1,500,000
Carnegie Foundation	
Retiring Allowance	500,000
Faculty salaries	<u>500,000</u>
Total	\$ 4,000,000

B. Wealthy Chicagoans.

<u>Number</u>	<u>Percentage Contributing</u>	<u>Number</u>	<u>Average Gift</u>	<u>Total</u>
1,500	10	150	50,000	7,500,000

C. Wealthy Persons Outside of Chicago.

500	5	25	1,000	25,000
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D. Persons of Influence.

(Used to get other gifts)

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	Number	Percentage Contributing	Number	Average Gift	Total
E. Non-Graduates.	15,000	20	3,000	200	\$1,600,000
F. Rush Alumni	15,000	25	4,000	100	400,000
	5,000	10	500	50	25,000
TOTAL GIFTS - INSIDE PROSPECTS					
					\$2,125,000

S. Outside.

A. Foundations.

General Education Board (Medical Project)	1,250,000
Rockefeller Foundation (Medical Project)	1,500,000
Carnegie Foundation Retiring Allowance	500,000
Faculty salaries	500,000
Total	\$4,000,000

B. Wealthy Chicagoans.

Number	Percentage Contributing	Number	Average Gift	Total
1,500	10	150	50,000	7,500,000

C. Wealthy Persons Outside of Chicago.

500	5	25	1,000	25,000
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D. Persons of Influence.

(Used to get other gifts)

E. Chicago Business Men.

5,000	20	1,000	100	100,000
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F. Wealthy Baptists.

100	10	10	1,000	<u>10,000</u>
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TOTAL GIFTS - OUTSIDE PROSPECTS	\$11,635,000
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Total Inside	6,185,000
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Unexpected sources - campaign momentum*	<u>2,180,000</u>
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TOTAL FOR THE CAMPAIGN	\$ 20,000,000
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*In every large campaign, such as those of Harvard, Princeton, Northwestern, etc., it has been found that substantial sums come in after the campaign period. These gifts are often unsolicited and yet must be attributed to the work of the campaign. They represent the delayed reaction of effective publicity.

V. CAMPAIGN SPECIFICATIONS.

1. Goal. Assuming that the immediate needs of the University are \$20,000,000, what should the campaign goal be?

A. Factors to be Considered.

- a. The amount publicly announced must seem within reason to the alumni and the public.
- b. On the other hand, the experience of other universities and colleges has shown that it is good tactics to aim higher than would seem to be strictly logical.
- c. The manner of announcement - whether the goal is announced as a total or in separate amounts at different times - would also have a bearing.
- d. The amount of money in sight, that the University can probably count on, is a matter of great importance.
- e. The period of time over which the campaign will extend should be considered with care.
- f. The experience of other Universities fails to show a precedent for as high a goal as \$20,000,000 (Harvard's goal, the highest

TOTAL FOR THE CAMPAIGN				
\$ 20,000,000				
Unexpended sources - campaign momentum*				
2,180,000				
6,185,000				
21,625,000				
	100	10	1,000	100,000
TOTAL GIFTS - OUTSIDE PROSPECTS				
	100	10	1,000	100,000
F. Wealthy Baptists.				
	20,000	20	1,000	100,000
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- The amount of money in sight, that the University can probably count on, is a matter of great importance.
- The period of time over which the campaign will extend should be considered with care.
- The experience of other Universities fails to show a precedent for as high a goal as \$20,000,000 (Harvard's goal, the highest

to date, was \$15,250,000) but on the other hand \$20,000,000 for the University of Chicago is proportionately logical in comparison with dozens of campaigns for \$1,000,000 and more by small and comparatively obscure institutions.

B. Conclusions.

- a. The University can set its goal at \$20,000,000, but should not announce it publicly as such.
- b. The goal can best be announced progressively.

2. Quotas.

A. Group. Since certain elements of the needs will be more popular than others, and since it is desirable to make the appeals as specific and attractive as possible, it will be wise to determine certain group quotas, as follows:

a. Trustees.

Power House

Miscellaneous needs

b. Faculty.

Endowment

c. Students.

Endowment

d. Alumni

aa. College

Men - central unit, new college

Women - women's halls

bb. Graduate

Endowment

e. Non-Graduates

Endowment

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Endowment

f. Rush Alumni

Endowment for the medical project

g. Special Prospects

Buildings - choice of object

B. Individual. In addition to the above group quotas, it will be desirable to determine individual quotas for general prospects, as a necessary part of the selling plan.

3. Campaign Period.

A. Factors to be Considered.

- a. The first thing to be considered is how long it would take to organize for the campaign.
- b. The next point is the necessity for giving the publicity program a chance to cultivate the field and to correct certain states of mind which might otherwise affect the campaign adversely.
- c. It must be borne in mind also that the situation calls for prompt action. Nothing has been done since 1917. Evidence of action at this time is regarded as essential to faculty morale and to the maintenance of good relations with contributors to the 1916 campaign.
- d. Another factor is the question of local competition. Northwestern University will be out of the way by June 1, in its intensive work, but will be continuing its solicitation in a quiet way on a permanent basis. Harvard will soon be entering the Chicago field in a campaign aimed almost entirely at large gifts. Several Chicago hospitals are planning important campaigns for capital account, within the next six to eight months.

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gifts. Several Chicago hospitals are planning important cam-

paigns for capital account, within the next six to eight

months.

e. The experience in other campaigns has shown:

- aa. That it takes anywhere between six months to a year to prepare alumni for a campaign.
- bb. That short, intensive "drive" periods are impractical.
- cc. That the full fruits of a big campaign are not to be had in less than two or three years.

B. Conclusions. In view of these facts, the best judgment would indicate the following procedure:

- a. Begin work at once on both organization and publicity.
- b. Devote the Spring Quarter to a campaign among the Trustees, and to a start on urgent cases among outside special prospects.
- c. At the June Convocation announce publicly a campaign for \$5,000,000 to complete the medical project.
- d. Take up the other needs in separate pieces of literature; making no public announcement of totals, and letting the magnitude of the project grow gradually.
- e. Carry on special gifts work, and general publicity, during the Summer and Fall.
- f. Announce a general campaign for the University-at-large at the December Convocation.
- g. Start the alumni canvass January 1, 1925.

4. Time for Payment. It is assumed that the payment of pledges will be arranged over a period of years. There are many obvious reasons why this is the best procedure. In the case of the University of Chicago there is the added reason that the payment of a series of gifts to capital account, on the part of the Alumni, will educate the alumni to give regularly, in substantial amounts, to current expense. It is believed that a campaign for

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b. Devote the Spring Quarter to a campaign among the Trustees,

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c. At the June Convocation announce publicly a campaign for

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added reason that the payment of a series of gifts to capital account, on

the part of the Alumni, will educate the alumni to give regularly, in sub-

stantial amounts, to current expense. It is believed that a campaign for

new capital furnishes in this way an excellent introduction for a permanent Alumni Fund.

5. Underwriting. The expenses of the campaign can be taken out of the University's Reserves and made good out of campaign receipts. In as large a campaign as this it is not important to cover expenses in special gifts.

VI. FACTORS AFFECTING THE CAMPAIGN. Finally, before reaching conclusions, what are the factors which will affect the campaign? These should be considered from both points of view; favorable and adverse.

1. Favorable.

- A. The sound financial condition of the University will be a distinct campaign asset.
- B. Business conditions are believed to be favorable.
- C. The Northwestern campaign has cultivated the ground without reaping more than a fraction of the harvest.
- D. President Burton enjoys the confidence of the alumni, and has already taken steps to set the alumni thinking along progressive lines.
- E. The University has a great asset in the business and social contacts of its Trustees.
- F. The University's story is one that virtually tells itself; it should not be difficult to convince the open-minded that the University's work is well worth while.
- G. The city of Chicago has developed to a stage where it is becoming a cultural center as well as a center of commerce and transportation. Its influential citizens are thinking along these lines in a way that should be easy to capitalize for the University.
- H. The University has several official contacts with Chicago business interests which should give it entree to important men.
- I. The fact that virtually all the buildings at the University are named

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- I. The fact that virtually all the buildings at the University are named

for Chicago people gives the University a local character that is obviously helpful.

- J. Football prospects are said to be bright - which is always an important factor in alumni morale.
- K. A large amount of money is already in sight.
- L. In the Alumni Fund, a certain number of the alumni have had an introduction to the idea that they have a responsibility to the University.
- M. The needs of the University fit well into a scheme of appeal; providing objects which should interest all classes of prospects.

2. Adverse.

- A. Unless it is corrected by well planned and constructive publicity, the impression that the University has plenty of money, and is still under the personal patronage of Mr. Rockefeller, is certain to affect the campaign adversely.
- B. The University has virtually neglected its Chicago contacts for many years; which will necessitate careful and intensive cultivation.
- C. The alumni are neither at an age, nor in occupations, which promise large returns. Furthermore, they will need extensive organization and publicity, to prepare them for the campaign.

VIII. GENERAL CONCLUSIONS.

1. That the University of Chicago is justified in conducting a progressive campaign, over a period of two years or more, for \$20,000,000.
2. That the campaign will be primarily a campaign for large gifts.
3. That the success of the campaign will be largely determined by the pace set by the Trustees.
4. That the alumni canvass should begin not sooner than January 1, 1925.
5. That the immediate and pressing problem is one of publicity.
6. That the campaign must be headed by the best available man on the Board of Trustees.

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of Trustees.

7. That President Burton must be released from all administrative duties for a period of about a year, to devote his attention to the solicitation of special gifts, public appearances and contacts with the alumni.
8. That every available member of the Board of Trustees should agree to give a certain specified number of hours per week to the business of the campaign.
9. That certain members of the Faculty should be released sufficiently to make important outside contacts.
10. That certain administrative officers should be released sufficiently to make regular contacts with alumni.
11. That work on lists should begin at once, and should be pushed vigorously.
12. That the Trustees should take steps to get a campaign mandate from the alumni, by some such method as conducting a general questionnaire on the future of the University.

End of Part I

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PART II

T H E P L A N

The Survey has shown that the University of Chicago needs \$20,000,000 with which to pay the salaries and to provide the buildings necessary for attracting and holding the outstanding teachers who are required for the proper maintenance of the institution's educational standards. The Survey has also indicated the field from which the University may logically expect support, and the conditions under which the work must be carried on.

The aim of the Plan is to outline the University's appeal, to lay down a basis for carrying that appeal to prospects by the means of organization and publicity, to indicate certain principles of campaign operation, and to provide a campaign budget.

The Plan therefore considers five main topics:

Section One - The Appeal

Section Two - An Outline for a Campaign Organization

Section Three - A Program of Campaign Publicity

Section Four - An Abridged Schedule of Operation

Section Five - A Campaign Budget.

PART II

THE PLAN

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Section One

THE APPEAL

Foreword. In laying out a method by which the University of Chicago can approach its field of prospects for the funds necessary to meet its needs, the first step is to analyze the appeal which will be made to the prospects. In this section, therefore, will be stated briefly the theme of the appeal, and the various specific reasons why the University of Chicago deserves support.

I. THEME.

1. General. The University of Chicago is the standard-bearer of education for the richest and most promising section of the United States. In tradition and in actual achievement it has set the pace for all the great colleges and universities of the Middle West; in methods of instruction, in educational ideals, in administrative efficiency; and in the intelligent and inspired pursuit of research. Its relation to the Middle West is characterized by unselfish service to sister institutions, and a live consciousness of its obligation to the community. There is no finer university between the Appalachians and the Rocky Mountains.

The future of this University, moreover, is closely attached to the future of the Middle West in general, and to the future of the City of Chicago in particular. The growth of the population, the extension of commerce, the growing complexity of finance, the recognition of social problems, all demand a corresponding development on the part of education. Chicago and the Chicago territory must have more and better trained men and women; the problems of the community require solution by research. More and more intimate must the relation be between the University and the community in which it lives; greater and greater must be the sense of responsibility which each feels toward the other.

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The University of Chicago, like the city whose name it bears, is young, virile, progressive, and successful. Its future should be the active concern of every person who is interested in the future of education, and in the future of Chicago and the Middle West.

2. Specific. There are three specific points of view from which the needs of the University can be stated:

A. Educational. The most important point of view, of course, is that of education, in the matter of

a. Instruction. The University offers to young men and young women a high type of education; training these people for lives of effective service.

b. Research. In its researches the University is adding rich stores to the world's fund of truth and knowledge.

B. Civic. It will be important to keep constantly in the foreground that the University is the University of Chicago.

C. Humanitarian. Prominent in the appeal for the medical project, of course, will be the humanitarian theme, based on the broad principle of preventive medicine and the alliance of medicine with the other sciences.

II. REASONS FOR GIVING. For the two great groups of prospects, the alumni and the special prospects, there are certain basic reasons for supporting the University as follows:

1. Alumni.

A. Loyalty.

a. To the University.

b. To the School or College - (love of alma mater)

B. Gratitude.

a. To the institution.

b. To individual teachers.

The University of Chicago, like the city whose name it bears, is young, virile, progressive, and successful. Its future should be the active concern of every person who is interested in the future of education, and in the future of Chicago and the Middle West.

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C. Self-Interest.

- a. To sustain the University for sons and daughters.
- b. To enjoy the personal prestige which comes with affiliation with a great University.

D. Financial. To take advantage of exemptions granted in taxation laws.

2. Special Prospects.

A. Interest in Education. The primary reason why any outside prospect should become interested in the University of Chicago is because of an interest in educational progress.

B. Interest in Research. With many people interest in education will take the specific form of interest in research; the fruits of which are tangible, popular, appealing.

C. Desire to Perpetuate a Name. There is a strong appeal in the memorial plan, for

- a. Buildings.
- b. Professorships.
- c. Fellowships.
- d. Scholarships.
- e. Special funds.

D. Desire to Use Funds Effectively. Among all human institutions there is none more enduring than the privately endowed university. Likely to endure as long as man, and free of taxation, the University offers the most effective use of private funds that is possible to find.

E. Civic and Sectional Pride. Many prospects in Chicago and the Middle West will be interested in the University because of its attachment to the city and its relation to the education of the Mississippi Valley.

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Section Two

AN OUTLINE FOR A CAMPAIGN ORGANIZATION

Foreword. The ultimate aim of any campaign organization is to bring a canvasser and a prospect face to face; the publicity having prepared the prospect to give the canvasser's appeal a respectful hearing.

In this section will be outlined the type of campaign organization suited to the situation at the University of Chicago. The Units of work should be followed without regard for personnel, since in the working out of the plan there will doubtless be cases in which individuals and individual committees will serve a double function. These units of work, however, are necessary in visualizing the method procedure.

What follows can be better understood, perhaps, by a study of the organization Chart accompanying the Plan.

I. EXECUTIVE DIRECTION. After the Trustees have decided to have a campaign, the subject of a campaign will immediately become an executive matter, passing to an Executive Committee appointed by the Trustees, and headed by an Executive Chairman who shall be the directing head of the work. The Campaign Treasurer will report to the Trustees. Details follow:

1. Executive Committee. This committee will have full authority to act for the Trustees in the conduct of the campaign.

A. Functions.

- a. To approve a plan of campaign.
- b. To approve a campaign budget.
- c. To decide the major points of policy.
- d. To approve campaign expenditures exceeding \$500.
- e. To retain professional assistance, if deemed necessary.
- f. To set up a Committee on Organization.

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AN OUTLINE FOR A CAMPAIGN ORGANIZATION

Foreword. The ultimate aim of any campaign organization is to bring a canvasser and a prospect face to face; the publicity having prepared the prospect to give the canvasser's appeal a respectful hearing.

In this section will be outlined the type of campaign organization suited to the situation at the University of Chicago. The Units of work should be followed without regard for personnel, since in the working out of the plan there will doubtless be cases in which individuals and individual committees will serve a double function. These units of work, however, are necessary in visualizing the method procedure.

What follows can be better understood, perhaps, by a study of the organization chart accompanying the Plan.

I. EXECUTIVE DIRECTION. After the Trustees have decided to have a campaign, the subject of a campaign will immediately become an executive matter, passing to an Executive Committee appointed by the Trustees, and headed by an Executive Chairman who shall be the directing head of the work. The Campaign Treasurer will report to the Trustees. Details follow:

1. Executive Committee. This committee will have full authority to act for the Trustees in the conduct of the campaign.

A. Functions.

- a. To approve a plan of campaign.
- b. To approve a campaign budget.
- c. To decide the major points of policy.
- d. To approve campaign expenditures exceeding \$500.
- e. To retain professional assistance, if deemed necessary.
- f. To set up a Committee on Organization.

- g. To put the completed organization in motion.
- h. To lend aid wherever necessary.
- i. To delegate all necessary authority to the Executive Chairman.
- j. To meet once a week and on call from the Executive Chairman.
- k. To receive reports from the Executive Chairman.
- l. To report to the Trustees.

B. Personnel.

- a. The Executive Chairman.
- b. The Vice-Chairman.
- c. The Chairmen of all national committees.
- d. The President of the University, ex-officio.
- e. The Treasurer, ex-officio.

C. Sub-Committees.

- a. Plan and Scope. The first move of the Executive Committee should be to appoint a sub-committee on Plan and Scope, to study the Plan of campaign in detail and to make recommendations on the course to pursue.
- b. Advisory Committee of 100. The Executive Committee should also recruit an honorary committee of leading Chicago citizens and others, for purposes of prestige, publicity, and valuable contacts.

2. Executive Chairman.

A. Functions.

- a. To assume the active leadership.
- b. To decide minor points of policy.
- c. To approve campaign expenditures less than \$500.
- d. To assist other committee chairmen, when necessary.
- e. To canvass certain special prospects.
- f. To be the public spokesman for the campaign.
- g. To sign certain campaign letters.

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- h. To lend aid wherever necessary.
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- g. To sign certain campaign letters.

- h. To receive reports from other committee chairmen.
- i. To receive daily reports from the Executive Secretary.
- j. To report to the Executive Committee.

B. Requirements for the Job. The position of the Executive Chairman is naturally the key job in the whole organization. It is of the utmost importance, therefore, that the Trustees select the right man. He should have the following qualifications.

a. Leisure.

To give at least two hours a day to the campaign.

To do a certain amount of travelling.

b. Prestige.

To win the confidence of the alumni.

To command assistance.

To command public respect.

To command newspaper attention.

c. Interest.

To feel a whole-souled interest in the University and in its campaign, and to be able to infuse this spirit in others.

d. Experience. To be accustomed to executive work and to dealing with men.

e. Health.

To stand up under the rigors of a long campaign.

f. Personality.

It is assumed, of course, that the Executive Chairman would be a man of magnetism and charm.

C. Personal Assistance.

- a. Vice-Chairman. The Executive Chairman should have a Vice-Chairman to substitute for him and to handle any executive matters which the Chairman might wish to delegate.

- h. To receive reports from other committee chairmen.
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- a. Vice-Chairman. The Executive Chairman should have a Vice-Chairman to substitute for him and to handle any executive matters which the Chairman might wish to delegate.

b. Professional Aid. If the University of Chicago follows the example of many other universities, the Chairman will have at his disposal the experienced aid of a professional organization, as follows:

aa. Consultation. In the case of the John Price Jones Corporation, there would be available the consultation services of the executives and the staff; to be given as a routine matter from the New York Office, and to be given in personal contact whenever necessary.

bb. Executive Secretary. The Executive Secretary is the representative of the John Price Jones Corporation in the field, working with the client, and in daily touch with the home office. In general, his duties are;

- i. To assist the Executive Chairman in every way possible.
- ii. To handle all campaign routine.
- iii. To set up the campaign office.
- iv. To keep a daily check on progress.
- v. To act as secretary for all national committees.
- vi. To supervise the work on the card index.
- vii. To oversee all supplies.
- viii. To cooperate with the Publicity Director.
- ix. To receive daily reports from
 - x. The Publicity Director.
 - y. The Office Manager.
- x. To make daily reports to
 - x. The Executive Chairman.
 - y. The John Price Jones Corporation.

cc. Publicity Director. Included in the professional aid, but usually working under the Chairman of the Committee on Publici-

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ty, is the Publicity Director, who is charged with the planning and execution of the campaign publicity. He reports daily to the Executive Secretary.

3. Treasurer. The Treasurer, as the direct representative of the Trustees, shall oversee the handling of all funds, and shall receive reports from the Controller.

II. PREPARATION. After the campaign has been provided with Executive Direction, the next step is to begin the work of preparation for the canvassing. This stage has two phases; the organization of personnel, and the preparation of lists.

1. Committee on Organization. Working directly under the Executive Chairman should be a Committee on Organization.

A. Functions.

- a. To recruit the working personnel for all national committees.
- b. To recruit local chairmen.
- c. To report to the Executive Chairman.

B. Personnel.

- a. The Executive Chairman.
- b. The Chairman of the National Committee on Special Gifts.
- c. The Chairman of the National Committee on Alumni.
- d. The Secretary-Treasurer of the Alumni Council.
- e. The President of the University, or his representative, ex-officio.

- C. Assistance. This committee will need the assistance of two or more paid alumni Field Agents.

2. National Committee on Lists and Quotas.

A. Functions.

- a. To approve a plan for handling lists.
- b. To supervise the preparation of all lists.
- c. To prepare a list of special prospects.
- d. To determine individual, group, and local quotas.

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- b. To supervise the preparation of all lists.
- c. To prepare a list of special prospects.
- d. To determine individual, group, and local quotas.

- e. To get lists of prospects from local committees.
- f. To report to the Executive Chairman.

B. Personnel.

- a. Someone familiar with Chicago.
- b. Someone familiar with the alumni.
- c. Someone familiar with list practices.

3. Local Committees on Lists and Quotas. Locally, the work of preparation will be undertaken by local committees on Lists and Quotas, which will check over the lists prepared at headquarters and report to the National Committee on Lists and Quotas.

III. SALES. The canvassing will require a centralized organization at headquarters, and local organizations.

1. National. All national committees will be purely administrative; existing solely for purposes of control. No national committee as such will do any canvassing.

A. National Committee on Special Gifts.

a. Functions.

- aa. To approve a plan for handling special prospects.
- bb. To analyze the list prepared by the National Committee on Lists and Quotas.
- cc. To gather information about individual prospects.
- dd. To determine the best sales method for each individual prospect.
- ee. To assign special prospects to local committees on Special Gifts.
- ff. To keep a check on the progress of the canvass.
- gg. To report to the Executive Chairman.

b. Personnel.

- aa. Someone familiar with persons of wealth.
- bb. Someone familiar with leading lawyers.
- cc. Someone having contacts with Chicago business men.

e. To get lists of prospects from local committees.

f. To report to the Executive Chairman.

B. Personnel.

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b. Someone familiar with the alumni.

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cc. Someone having contacts with Chicago business men.

- dd. The Executive Chairman, ex-officio.
- ee. The President of the University, ex-officio.
- ff. A leading physician.

B. National Committee on Alumni.

a. Functions.

- aa. To approve a plan for canvassing alumni.
- bb. To receive the lists of alumni.
- cc. To assign the lists to local chairmen.
- dd. To cooperate with local chairmen in making the canvass.
- ee. To keep a check on the progress of the canvass.
- ff. To receive reports from local chairmen.
- gg. To report to the Executive Chairman.

b. Personnel.

- aa. The Chairman.
- bb. The Secretary-Treasurer of the Alumni Council.
- cc. Two alumni faculty members; a man, and a woman.
- dd. The alumni Trustees.
- ee. Individual representatives of the six alumni associations represented in the Alumni Council.
- ff. The chairman of the Special Committee on Rush Alumni.

- c. Sub-Committees. The Special Committee on Rush Alumni should be organized to take care of the 5,000 alumni of Rush Medical College.

- C. National Committee on Follow-up. This committee will not be appointed for over a year. It will take up the solicitation at the end of the active campaign and will seek to finish the canvass along new channels. Among the alumni this will take the form of a class canvass, or a canvass by clubs.

2. Local. The actual canvass will be carried on by the local organizations, as indicated above. These local canvasses will include those among the Faculty,

- dd. The Executive Chairman, ex-officio.
- ee. The President of the University, ex-officio.
- ff. A leading physician.

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, among the Students, among the business men of Chicago, and among the alumni and the special prospects. The sales organization includes:

A. Local Chairmen.

a. Functions.

- aa. To appoint local committees.
- bb. To receive the lists from headquarters.
- cc. To assign the prospects to canvassing committees.
- dd. To keep a check on the progress of the canvass.
- ee. To receive reports from local committees.
- ff. To report to national headquarters.

b. Personnel. The men picked as local chairmen should obviously be the most effective available men, regardless of the nature of his degree from the University.

B. Local Committees on Lists and Quotas. Although this committee is not a canvassing body, and has already been described under Preparation, it should be mentioned again at this point in order to present a complete picture of the local organization.

C. Local Committees on Special Gifts.

a. Functions.

- aa. To cooperate directly with the National Committee on Special Gifts.
- bb. To canvass all local special prospects on order from national headquarters.
- cc. To report to the Local Chairman.

b. Personnel. Members of this committee should be those who have the best contacts and are the most effective salesmen. At times they should be assisted by special salesmen from headquarters.

D. Local Committees on Alumni.

a. Functions.

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A. Local Chairman.

a. Functions.

- aa. To appoint local committees.
- bb. To receive the lists from headquarters.
- cc. To assign the prospects to canvassing committees.
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D. Local Committee on Alumni.

a. Functions.

- aa. To receive the lists of alumni from the Local Chairman.
- bb. To assign the prospects to workers, according to school or college affiliations.
- cc. To receive reports from workers.
- dd. To report to the Local Chairman.

b. Personnel.

- aa. The Local Chairman.
- bb. Local representatives of the six alumni associations represented in the Alumni Council.
- cc. An alumnus of Rush Medical College.

E. Special Local Committees.

- a. Committee on Faculty Canvass.
- b. Committee on Student Canvass.
- c. Special Committee of Chicago Business Men.

IV. ADVERTISING. All sales, or canvasses, should be facilitated by advertising, or campaign publicity. There will therefore be a Committee on Publicity.
(For a discussion of the publicity itself see Section Two.)

1. Functions.

- A. To approve a program of publicity.
- B. To decide publicity policies.
- C. To approve major units in the publicity material, such as pamphlets, letters of appeal, etc.
- D. To make useful publicity contacts.
- E. To furnish speakers.
- F. To arrange campaign meetings.
- G. To receive reports from the Publicity Director.
- H. To report to the Executive Chairman.

2. Personnel.

- A. Alumni having newspaper contacts.

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- H. To report to the Executive Chairman.

2. Personnel.

- A. Alumni having newspaper contacts.

- B. Someone familiar with fine printing.
- C. Someone familiar with possible speakers.
- D. Someone familiar with advertising.
- E. The Secretary-Treasurer of the Alumni Council.
- F. The Secretary to the President.

V. CONTROLLER. The controller will be located at national headquarters and will be responsible to the Treasurer. He will have the following functions:

1. To represent the Treasurer in receiving, recording and acknowledging all subscriptions, and in collecting payments on pledges.
2. To order all supplies, including printing.
3. To check and pay all bills, expense accounts and salaries.
4. To maintain a complete inventory of all goods belonging to the campaign.
5. To keep office stores.
6. To perform miscellaneous duties of business management.
7. To report to the Treasurer.

VI. SERVICE. Serving all departments of the work, under the direct supervision of the Executive Secretary, will be a Service Bureau, headed by an Office Manager and staffed with stenographers, typists, list clerks, messengers, file clerks, telephone operator, bookkeeper, etc.

The Service Bureau will perform the following functions:

1. To handle the card index.
2. To handle campaign material.
3. To take care of campaign correspondence.
4. To handle the files.
5. To render service to all committees.
6. To report to the Executive Secretary.

- H. Someone familiar with fine printing.
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(NOTE: Inasmuch as the efficient management of the Service Bureau is such an important factor in the campaign - particularly that function which has to do with the setting up of the card index - a separate plan of operation, or standard practice, should be prepared on the ground by the Executive Secretary, working with the home office of the John Price Jones Corporation.)

End of Organization.

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End of Organization.

Section Three

A PROGRAM OF CAMPAIGN PUBLICITY

Foreword. In this section will be outlined the program of campaign publicity with which the University should prepare its prospects for the canvass.

I. PURPOSE. Before outlining the material itself, it is best to set down the specific objectives of the publicity, which are:

1. Educational

- A. To create friendly and active interest in the University among all classes of prospects.
- B. To establish a closer contact with Chicago.
- C. To correct the existing negative impressions:
 - a. That the University is supported by Mr. Rockefeller.
 - b. That the University has plenty of money.
 - c. That the University is drifting away from the college idea.
- D. To sell the University's general program of improved educational service and more extensive contributions to research.
- E. To build up inside morale.
- F. To train the workers for the campaign.

2. Sales.

- A. To indicate the reasons for supporting the University.
- B. To show the University's needs.
- C. To take up individual items of the needs.
- D. To solicit gifts and bequests.
- E. To thank contributors.
- F. To hold the interest of contributors for future appeals.

II. MATERIAL. The publicity material falls into six general classifications; press, direct advertising, motion pictures, features, speakers, and radio.

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direct advertising, motion pictures, lectures, speakers, and radio.

1. Press. The term "press" includes all material for periodicals; such as newspapers, weeklies, monthly magazines, technical journals, etc. What follows, however, has mostly to do with the daily press - the newspapers, syndicates, and press associations.

- A. Policy. The policy on newspaper publicity should be a simple requirement that all material should serve at least one of the purposes of the publicity program, as set forth above. The test for all copy, in other words, should be simply this: "Is it constructive?"

Such a policy would guard against undesirable publicity on the one hand, and yet would encourage publicity of a more creative type than that which has been the rule in the past.

- B. Relations. An effort should certainly be made to cultivate closer and more constructive relations between the University and

- a. Publishers.
 - b. Editors.
 - c. Correspondents.

(In connection with the student correspondents, it is believed that the University should establish a permanent press bureau, according to a plan which can be developed later.)

- C. Copy. There are many different types of copy which are suited for press distribution, as follows:

- a. News. There are two kinds of news to be developed, each important and constructive.

- aa. Routine. This is the type of News which the University now issues in its weekly bulletin, such as Faculty appointments, official announcements, and so on.

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To this existing schedule should be added a routine program which has proved highly effective everywhere; the distribution to home town papers of personal news about students at the University, their academic honors, social elections, athletic achievements, and so on.

The whole field of routine news should be so organized as nearly to take care of itself.

- bb. Creative. Rich though the University may be in routine news material, however, the campaign must depend for the most part on the creative work of the Publicity Director, in covering the activities of the different departments of the University, in securing interviews, in conducting news surveys, in covering the progress of the campaign, and in every way keeping the University constantly and constructively in the news columns.

- b. Special Articles. Material of news interest, but which does not meet the news requirement of timeliness, or which is better suited to longer and special treatment, should be prepared as special articles, for the feature or Sunday sections of the daily press, and for weeklies and monthly magazines. For this type of publicity the University has a rich fund of material in its research work alone.

- c. Photographs. There is an ever-widening market for still photographs of news interest. The publicity

To this existing schedule should be added a routine program which has proved highly effective everywhere; the distribution to home town papers of personal news about students of the University, their academic honors, social distinctions, athletic achievements, and so on.

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policy should operate here to provide photographs which serve a constructive purpose and which at the same time meet the press requirements of "human interest".

- d. Editorial Suggestions. There should be a constant stream of special material such as
 - aa. Letters to the Editor - for publication.
 - bb. Letters to city editors - suggesting special stories.
 - cc. Fillers - brief articles of 50 - 200 words, suitable for use at any time in "making-up".
- e. Direct Mail Literature. The press should receive copies of virtually all of the direct mail literature, for editorial comment, and for general information.

D. Distribution. The distribution of press material will be affected in various ways, as follows:

- a. Direct by mail, from the University to the publication. This will involve building up the list now used for the weekly bulletin.
- b. By the Associated Press; on the wires or by mail.
- c. By the news services and syndicates, such as

- United Press
- United News Service
- International News Service
- Universal Service
- Cosmopolitan News Service
- N. E. A. Service, Inc.
- Science Service
- George Matthew Adams Service
- McNaught Syndicate
- McClure Newspaper Syndicate
- etc.

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etc.

d. By newspaper correspondents, such as

Student correspondents

Chicago correspondents of outside newspapers.

e. By way of special writers having newspapers and magazine contacts, which will involve preparing a list.

f. By invitation to local news editors, to send reporters.

g. Through the University's own periodicals.

2. Direct Advertising. The direct advertising should include pamphlets, letters, bulletins, and special data, as follows:

A. Pamphlets. No attempt will be made here to lay down the description and printing specifications for each pamphlet to be used during the campaign. The University is peculiarly well fitted to handle the pamphlets on the technical side, with the University Press and its arrangement with Mr. Kittredge, the Donnelly typography expert. The copy itself, moreover, can scarcely be mapped out satisfactorily at this time, for such a lengthy period.

It should be observed, however, that all pamphlets should be physically related according to a central plan; such as that which was followed in the cases of Lehigh and Northwestern. It is regarded as fundamental that campaign pamphlets should be similar in appearance, should be printed in big type, should be tastefully decorated and adequately illustrated, and printed with the degree of excellence which commands attention.

The pamphlets will all fall in two classes:

a. Educational.

aa. Alumni Pamphlets. This series, already under way, will perform the educational function admirably.

The series should be a permanent feature at the

d. By newspaper correspondents, such as

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The pamphlets will fall in two classes:

a. Educational.

1. General Pamphlets. This series, already under way

will perform the educational function admirably.

The series should be a permanent feature of the

University, with special issues during the campaign, and with an augmented circulation list.

- bb. The University and the City. There should be at least one pamphlet on the relation between the University and the City of Chicago; to establish closer contact between the University and prospects in Chicago interested in the civic appeal, such as persons of wealth and the business men.
 - cc. "Letter to Mr. Rockefeller". The incorrect impression concerning the present relation between the University and Mr. Rockefeller can be approached in a positive manner by a pamphlet prepared as "An Open Letter to John D. Rockefeller", signed by President Burton and the Trustees, and carrying a message of gratitude upon the completion of the payment of the final gift, and a declaration of the University's belief that from now on it can depend on its alumni and on the people of the Middle West.
 - dd. Campaign Handbook. There must be a handbook concerning the needs of the University, and the details of the campaign, for the information of all workers and committeemen.
- b. Sales. There must then be a series of sales pamphlets, with definite particulars, plans, and pictures, on the following subjects:
- aa. The Medical Project. This pamphlet will carry the scientific and humanitarian appeal to special prospects. It will have a limited distribution.

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bb. The University and the City. There should be at

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jects. It will have a limited distribution.

- bb. Other Building Units. There will be a special pamphlet or layout for each of the University's other building projects, for distribution to certain special prospects who might be interested to giving whole buildings as memorials.
- cc. New Colleges. This pamphlet will appeal to alumni of the colleges, but will also be suitable for use with certain special prospects who are not interested in other parts of the building program.
- dd. Faculty Salaries. A single pamphlet should take up the question of endowment for faculty salaries, for distribution to prospects who will get the endowment appeal, such as students, alumni of the graduate schools, non-graduates, and special prospects not interested in buildings.
- ee. Research Endowment. This will carry the scientific and educational appeal to special prospects who are interested in research rather than buildings or salaries.
- ff. Rush Alumni. This pamphlet will make the special appeal to Rush Alumni, for endowment for the medical project.
- gg. Faculty Canvass. To be used in soliciting the faculty.
- hh. Student Canvass. To be used in soliciting the students.
- ii. Chicago Business Men. To be used in the special canvass of 5,000 Chicago business men.
- jj. Financial Facts. A statement of the financial facts concerning gifts to the University; such as information on income tax provisions, inheritance taxes, annuities, and all the other financial data listed under the heading of Inducements to Donors, in the Survey. This pamphlet will be used for all special prospects.

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kk. Major Pamphlet. There must also be one major pamphlet which will tell the substance of the whole story. This should be prepared in two forms; a de luxe edition for special prospects, and a cheaper edition for general distribution.

B. Letters. One letter in the form of a pre-campaign document has already been issued, in printed form, from Professor James W. Linn to the Alumni. Other letters, inspirational and of direct appeal, must be issued as the campaign progresses, such as

- a. A letter from Mr. Swift to the members of the Faculty, to strengthen morale and inspire enthusiasm.
- b. A letter from President Burton to the Rush Alumni.
- c. A letter from Mr. Stagg to the "C" men.
- d. A letter from Dr. Slaughter to the Doctors of Philosophy.
- e. A letter from Dean Wilkins to the alumni of the colleges.

C. Bulletins. When the campaign gets into the active stage, a regular bulletin should be sent to all workers, carrying campaign news and material of an inspirational nature.

D. Special Data. For special prospects there is additional direct advertising material to be furnished, such as

- a. Special photographs, in special albums.
- b. Information on inheritance taxes.
- c. Information on famous memorials.
- d. Sample biographies by Dr. Goodspeed.
- e. Sample fund reports by the Auditor.
- f. Special statements from the head of the department in which the prospect is believed to be interested.
- g. Special information on research for which the University must have funds.

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III. MOTION PICTURES. The University should make use of three types of motion pictures:

1. Institutional. The film taken in 1916 should be edited and amended and brought up to date, for use at alumni meetings. A reel of 1,000 feet should prove a great attraction in getting alumni together, and should be well worth the expense.
 2. News Weeklies. Motion picture companies are constantly on the lookout for suitable material for screen news weeklies, such as those conducted by Pathe, International, and Fox. For the Chicago theatres at least, an effort should be made to provide publicity which will serve this purpose.
 3. Educational Films. Other motion picture companies are on the lookout for pictures of an educational nature. The University's work in research should provide an abundance of this material.
- f. Features. It will be the further function of the publicity program to plan and execute a number of features which will dramatize the appeal and create favorable publicity. Emphasis here should be placed on the University's aim of rendering greater service, and on establishing the closer contact with Chicago and the Middle West. Examples follow:

A. Survey of Chicago. It is suggested that the University should conduct a thorough survey on the future of the city of Chicago, in the matter of its population, its commerce, its housing, its transportation facilities, and the trend of its growth. This investigation could be carried on by research students under the direction of some authority such as Professor J. O. McKinsey of the School of Commerce and Administration. Co-operation could easily be secured from the local telephone company, the chamber of commerce, real estate boards and so on.

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The aim of the survey should be to find out how the University of

Chicago can render greater service to the city, and to show the probable status of the city, and of the University, on the city's centennial. Publication of the results of the survey should be made an impressive occasion, just prior to the opening of the public campaign.

- B. Service Questionnaires. Another effective method for securing constructive publicity, and interested support, is the issuance of questionnaires, to be sent out by President Burton on the occasion of the completion of his first year in the presidency, for the purpose of finding out how the University can render greater service. These questionnaires should serve a double purpose; first, to get helpful suggestions from the University's constituency, and second, to tie up the constituency to the University's program in a positive way. In each case the questionnaire should indicate the broad lines of President Burton's policy and should endeavor to get reactions thereto which would commit the constituency to some form of progressive action.

This feature should be adopted for three groups:

- a. Alumni. The opportunity here should be taken to point out that Mr. Rockefeller has made his final gift and that the responsibility for the University rests with the alumni.

How, in the opinion of the alumni, can the University be of greater service? What should be the lines of its future development? What place in the world of education should the University seek to fill? - This should be the general trend of the query.

- b. Editors. Newspapers and universities, in the strictest sense of the word, each exist for education. The newspapers and universities of the Middle West in particular are working in

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b. Public. Newspapers and universities, in the strictest sense of the word, each exist for education. The newspapers and universities of the Middle West in particular are working in

the richest educational field in the world. Their responsibility to the people is a great one.

How, in the opinion of the newspaper editors of the Mississippi Valley, can the University render greater service? In what specific ways can it improve on its service to the people?

(This feature should be worked out with the assistance of an Advisory Committee of Chicago newspaper men, headed by the District superintendent of the Associated Press.)

- c. Chicago Business Men. Prior to the publication of the Survey suggested as the first feature, a questionnaire should be sent to the 5,000 business men whose support the University will seek later, asking their suggestions on how the University can better serve Chicago.

- C. Visitor's Day. Though the University is always open to visitors, emphasis should be placed on some one day upon which the University would officially hold "open house" for the people of Chicago. This event should be given formal importance, with the co-operation of all available Trustees and Faculty members. Special invitations should be issued to special prospects, with teas at Ida Noyes Hall, the Quadrangle Club, Reynolds Club, fraternity houses, and so on. Special research demonstrations should be given for certain prospects.

- D. Alumni Home-Coming. Sometime prior to the opening of the alumni canvass an effort should be made to bring all the campaign local chairmen back to Chicago, for instruction and inspiration.

- 5. Speakers. A corps of speakers should be provided, for meetings, in Chicago and for "swings around the circle". These speakers should then be furnished with distinct points of the appeal which the University wishes to drive home. Finally, of course, provision should be made for

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6. Radio. The University should avail itself of every opportunity to spread its message by radio. Arrangements should be made to install a studio at the University for the convenience of the co-operating professors in making the three 15-minute lectures per week which are open at WMAQ. Advantage should also be taken of any opportunity to associate with the proposed broadcasting station of Sears, Roebuck and Company.

In the matter of material for these lectures the University is richly provided; with stories of research and scientific achievement, and with such general educational material as the course to be given to freshmen next Fall on "The Nature of the World and of Man".

It is not inconceivable that this radio work may take the form of regular University work under the Correspondence Study Department, with the students getting the actual classroom lectures, in abbreviated form, and returning papers to be corrected in the manner now in practice.

To recognize the radio medium officially, by creating a new department of the University, would be a characteristically progressive step, and one which would bring the University nationally wide publicity.

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Section Four

AN ABRIDGED SCHEDULE OF OPERATION

Foreword. It is not feasible at this time to lay out a detailed operating schedule, for the length of time involved in the plans for a campaign. It will rather be the aim here to indicate certain first steps, and then the main points of the general operating program.

I. FIRST STEPS.

1. Organization.

A. Workers.

a. Policy. It cannot be stated too strongly that the success of the entire campaign depends on the interest and efficiency of the individual workers. This is the most common point of weakness in college campaigns, and calls for intensive effort all along the line. The original working force seldom endures; many of those who volunteer at the first call drop out when handed their first job. The working force in a college campaign is in a constant state of change, and calls for a long period of patient and persistent cultivation. If the University of Chicago is to profit by the experience of sister institutions, therefore, it will begin at once to recruit and train its staff of committeemen and workers, and will continue the process until it has reached a point where every worker knows his job and is ready and anxious to do it.

b. Procedure. The University must first sell its program, and the campaign idea, to the following groups, in order:

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quota toward the goal.

- bb. Rush Faculty. Since the medical project will be the first objective, and since physicians are so influential in securing funds for hospitals and projects of medical science, it is believed that the next educational step will be to sell the idea to the faculty of Rush Medical College and to the staff of Presbyterian and the allied hospitals.
- cc. University of Chicago Faculty. The next group to educate is the faculty of the University.
- dd. Alumni Leaders. The leading alumni, who take the active parts in the conduct of the Alumni Council and the member associations, should be the next group to be educated.

B. Lists.

- a. Policy. The second most common source of weakness in the average college campaign is the list of prospects. Lists which appear satisfactory on paper turn out to be incomplete and inaccurate; too many logical prospects are never listed; too large a percentage of "lost alumni" are never found; information on individual prospects is inadequate or misleading. Nothing can injure the workers' morale quicker or more seriously than the realization that this list of prospects is wrong. To build satisfactory lists, and to keep them accurate and useful, takes a lot of time, and unremitting toil. Work at Chicago, on building up lists, should begin at once, and should be regarded at all times as a major campaign task.

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stencils in the present list of 20,000. It is further suggested that selectors be arranged for grouping men and women separately.

bb. Non-Alumni. It is recommended that a test be made on non-alumni who have credit for nine or more majors; picking 1,000 names at random rather than taking the last 1,000 names on file.

cc. Students. It is suggested that in the case of students in the colleges, the names of parents be collected, since it has been found that an appeal to parents direct, rather than to students, yields far better results. Moreover, the assembling of a list of parents would doubtless bring to light many persons of wealth who should be included in the canvass of special prospects.

dd. Special Prospects. As a first step toward adding to the existing list of 1,000 wealthy Chicago people, it is suggested that the University call a meeting of some 40 or 50 young bond salesmen, Chicago alumni, and ask for additional names. It is believed that this method will bring to light many representatives of Chicago's undiscovered rich.

C. Headquarters.

a. Location. The campaign office should be located at the most advantageous point for the Executive Chairmen and the Chicago committeemen; for meetings, service, and quick contact. This means that the campaign office should probably be located in the Loop rather than at the University.

b. Space. The campaign office will require approximately 2500 square

stencils in the present list of 20,000. It is further suggested that selectors be arranged for grouping men and women separately.

bb. Hon-Alumni. It is recommended that a test be made on non-alumni who have credit for nine or more majors; picking 1,000 names at random rather than taking the last 1,000 names on file.

cc. Students. It is suggested that in the case of students in the colleges, the names of parents be collected, since it has been found that an appeal to parents direct, rather than to students, yields far better results. Moreover, the assembling of a list of parents would doubtless bring to light many persons of wealth who should be included in the canvass of special prospects.

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b. Space. The campaign office will require approximately 2500 square

feet of floor space.

- c. Standard Practice. It will be the duty of the Executive Secretary to prepare a standard practice for the conduct of the campaign office.

2. Publicity. The guiding principle of the publicity program should be the principle of working according to an orderly, constructive plan, in four steps:

A. Gathering the Material.

- a. Plans.
- b. Pictures.
- c. Statistics.
- d. Data for stories.
- e. Data for pamphlets.
- f. Special data for special prospects.

B. Visualizing the Material.

- a. Preparing the layout for all copy to be written.
- b. Preparing the publicity lists.

C. Preparing the Material.

- a. Writing the copy.
- b. Preparing the printing specifications.

D. Distribution. A plan of distribution, showing the purpose and destination of all material, must be worked out in detail.

3. Canvassing.

- A. Special Prospects. There is no more fundamental principle in the solicitation of large gifts than the theory that at least two solicitors should make each call. In the most important cases, this would mean that President Burton, calling on a wealthy Chicago man, would be ac-

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accompanied by a member of the Board of Trustees.

- B. General Canvassing. A detailed sales plan must be worked out for the rest of the canvassing.
- C. Immediate Procedure. The first step in the canvass is to secure the quota of the Trustees; which should be set at \$4,000,000, for all past and present members and their affiliated families.

After the Trustees are on record, the next step will be to approach certain special prospects in a preliminary canvass for the medical project.

II. GENERAL PROGRAM. The successive campaign phases, in general, will be as follows:

1. First Stage.

- A. The Trustees approve the plan, in principle.
- B. The Trustees appoint an Executive Committee.
- C. The Executive Committee elects an Executive Chairman.
- D. The Executive Chairman appoints a Vice-Chairman and a special Committee on Plan and Scope.
- E. The Committee on Plan and Scope studies the plan in detail and makes recommendations to the Executive Committee as to the exact course to be pursued.
- F. The Executive Committee approves the report of the Committee on Plan and Scope and appoints a Committee on Organization.
- G. The Executive Committee decides on question of retaining professional aid.

2. Second Stage.

A. Organization.

- a. The Committee on Organization starts building up the national committees.

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2. Second Stage.

A. Organization.

- a. The Committee on Organization starts building up the national committees.

- b. The Executive Secretary sets up campaign headquarters.
- c. The Executive Committee starts its work of education among Trustees, Faculty, and leading alumni.

B. Publicity. The Publicity Director starts laying out the publicity program.

3. Third Stage.

- A. Organization. The Committee on Lists and Quotas starts building up lists.
- B. Publicity. The Committee on Publicity approves the publicity program.
- C. Canvassing. The Trustees start raising their own gift to the University.

4. Fourth Stage.

- A. Organization.
 - a. National committees get under way.
 - b. Field men begin establishing alumni contacts.
- B. Publicity.
 - a. Material for special prospects is prepared.
 - b. Material for the general canvass is laid out.
 - c. Organization handbook is prepared.
- C. Canvassing. The preliminary canvass of certain prospects for the medical project gets under way.

5. Fifth Stage.

- A. Organization.
 - a. Local chairmen are recruited.
 - b. Local chairmen start organizing local committees.
 - c. Local committees on Lists and Quotas start co-operating with the national committee.
 - d. Field men begin regular organization contacts with local organiza..

- b. The Executive Secretary sets up campaign headquarters.
- c. The Executive Committee starts its work of education among Trustees, Faculty, and leading alumni.

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B. Publicity.

- a. The University announces campaign to complete medical project.
- b. Material for the general canvass is prepared.
- c. Educational pamphlets are launched.

C. Canvassing.

- a. Local committees on special gifts launch intensive canvass of special prospects for medical project.
- b. Preliminary canvass of special prospects for other needs.

6. Sixth Stage.

A. Organization.

- a. Workers for general canvass are recruited.
- b. Canvassers are trained.

B. Publicity.

First sales pamphlets are launched.

C. Canvassing.

Local committees on special gifts start intensive canvass for the needs of the University-at-large.

7. Seventh Stage.

General Canvass.

8. Eighth Stage.

The follow-up canvass begins.

9. Ninth Stage.

The University winds up the campaign and puts its promotion work on a permanent basis.

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SECTION FIVE

A CAMPAIGN BUDGET

Estimated necessary expenditures for one year.

The items in this budget are fixed upon general experience in campaigns, with especial reference to the costs of the efforts by which Harvard University raised nearly \$14,000,000 and Northwestern University \$7,500,000.

In considering these estimates it should be borne in mind that they are in the rough, except to the extent that previous experience may be relied upon. There will be many fluctuations and possibly the addition of new items if unusual situations develop. But the figures set down here will serve as a guide to those entrusted with the finances of the campaign and will clearly indicate the limits within which expenditures should ordinarily be made.

Saving in many items may be accomplished by the increase in amount of volunteer labor and services secured and facilities donated. But no saving should be contemplated that does not provide for smoothness in operation and equal effectiveness in results.

With the idea of attempting to fix a minimum expense for the period the cost has been made purposely high in every case where a margin existed.

Salaries..... \$50,000

This includes such services as field agents, paid alumni, speakers, secretarial and stenographic help, clerks, general office personnel, office boys, librarian, mimeograph and multigraph operators, mailing room employes, etc.

Rent.....\$ 5,000

This includes the expense of a headquarters office of 2500 square feet.

Office Supplies..... \$ 2,000

This includes the ordinary working equipment outside of desks and furniture and provides for ink, pens and pencils, desk equipment

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Office Supplies..... \$2,000

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and similar material.

Furniture and Fixtures..... \$6,000

This provides desks, tables, chairs, filing equipment, carpets and rugs, for an office of the size contemplated and for the force needed in such an office.

Telephone..... \$1,500

This includes the expense of switchboard service. The telephone traffic in campaigns, for both preparatory and intensive periods is apt to be heavier than in even the ordinary business office. A great amount of long distance traffic will develop.

Telegraph..... \$1,300

The continual necessity for communicating quickly with large groups controls the use of the telegraph for campaign purposes.

Printing..... \$21,500

This includes the expense of the mechanical production of booklets, pamphlets, broadsides, reports, forms, cards for recording purposes and also for all classes of stationery.

Travel..... \$10,000

This provides for the traveling expenses of campaign committee representatives and employes, field agents, speakers, and for bringing necessary field units to headquarters as occasion demands. It also provides for sending university organizations into the field for publicity and organization purposes. It is believed that the campaign will involve an unusual amount of traveling and that the sum allowed should exceed even the generous figure set by Northwestern University.

Entertainment..... \$ 7,000

This provides for dinners, luncheons, meetings and other functions for which the expense properly rests upon the campaign.

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This includes all expense for mailing out printed material, bulletins, the Magazine, and for the vast amount of ordinary correspondence which will be necessary.

Mimeograph, multigraph and Hooven.....\$ 2,000
This includes the expense of bulletins, reports, some letters, articles for publications and the use of letters in general direct advertising features of the campaign.

Mailing Service.....\$ 1,000
This includes the services required to handle large mailings of campaign material and ordinary work which must be turned over to outside organizations.

Art Work and Engravings.....\$ 1,000
This includes the art work and cuts for campaign printed material, cuts for newspapers and other publications as required.

Photographs.....\$ 750
This includes possible airplane views and the cost of taking and buying photographs for publications and for printed material.

Publicity Mats.....\$ 800
This will provide for sending three mats to each of the worthwhile mat-using newspapers in the country.

Radio and Motion Pictures.....\$ 3,500
This would provide for at least one elaborate broadcasting and for one comprehensive film showing all phases of the university.

Newspapers and Books.....\$ 500
This will provide the facilities needed at headquarters for keeping track of progress and in building up the necessary working reference library.

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Advances to Local Chairmen..... \$2,500

This will provide for the expense of setting up office and for organization expenses in the field.

Distribution of the Magazine..... \$3,000

This will provide for sending the Magazine to every alumnus during the period.

Contingency Fund..... \$5,000

This will provide for emergencies, losses and unforeseen expenses.

PROFESSIONAL SERVICES..... \$34,100

The John Price Jones Corporation.....\$12,000

This provides the general supervisory and consultative services of the Corporation as exercised through its officers and for full use and benefit of the Corporation's statistics, researches and records which have been compiled during the conduct of more than one hundred campaigns and which are being constantly added to as new methods and theories of campaign practice are developed. It also provides for the expense of at least one visit each month by an officer of the Corporation to the campaign headquarters for such a period as may be required.

Campaign Director.....\$11,700

This provides the constant service of an expert campaign director acting under the supervision of the John Price Jones Corporation and charged with the duty of putting the campaign plans into effect in collaboration with the campaign officials.

The amount also includes the living expense of the director.

Publicity Director.....\$10,400

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GRAND TOTAL OF CAMPAIGN EXPENSES.....\$168,450

Note: The grand total of estimated expenses exceeds those of the Harvard and Northwestern campaigns by substantial amounts. For a similar period Harvard spent \$147,000 and Northwestern \$136,000. It should be remembered, however, that in the Northwestern campaign the University maintained an additional separate publicity organization at an approximate additional cost of \$40,000 for the period and that Harvard University also conducted extensive publicity work, the expense of which is not included in the campaign total.

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GENERAL SUMMARY AND CONCLUSIONS

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Part I - Survey.

Section One, "The Present Status of the University," describes the character of the University, its service, its relationships with alumni and outsiders, and its finances and resources, and draws the following conclusions:

1. That the University of Chicago is performing a national service in the cause of education and research.
2. That the University has reached a stage in its development which requires new financing; ultimately for the expansion which is necessary to the like of every great university, but immediately for the sake of regaining ground that has been lost. New financing must meet squarely certain fundamental educational needs which have either been directly neglected or else compromised by half measures which have seriously threatened the University's morale and prestige.
3. That the University must depend on gifts for its additional finances.
4. That only a small proportion of the alumni have reached an age, or have entered occupations, which would justify the expectation of gifts of considerable size.
5. That the alumni need more intensive organization, and immediate cultivation by every device available.
6. That the University should adopt a program of constructive and intensive publicity, for the purpose of bettering its relations with the press, the general public, and persons of wealth.

Section Two. "The University's Future," described briefly the University's program and its needs, and sets the immediate needs at \$20,000,000.

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1. That the University of Chicago is justified in conducting a progressive campaign, over a period of two years or more, for \$20,000,000.
2. That the campaign will be primarily a campaign for large gifts.
3. That the success of the campaign will be largely determined by the pace set by the Trustees.
4. That the alumni canvass should begin not sooner than January 1, 1925.
5. That the immediate and pressing problem is one of publicity.
6. That the campaign must be headed by the best available man on the Board of Trustees.
7. That President Burton must be released from all administrative duties for a period of about a year, to devote his attention to the solicitation of special gifts, public appearances, and contacts with the alumni.
8. That every available member of the Board of Trustees should agree to give a certain specified number of hours per week to the business of the campaign.
9. That certain members of the Faculty should be released sufficiently to make important outside contacts.
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12. That the Trustees should take steps to get a campaign mandate from the alumni, by some such method as conducting a general questionnaire on the future of the University.

Part II - Plan.

Section One, "The Appeal", outlines the theme of the University's story, and sets forth the reasons for contributing to the University's needs. The appeal is represented from three points of view: educational, for instruction and research; civic, for establishing the contact with the city of Chicago; and humanitarian for the medical project. The general theme is this: the University of Chicago, like the city whose name it bears, is young, virile, progressive, and successful. Its future should be the active concern of every person who is interested in the future of education, and in the future of Chicago and the Middle West.

Section Two, "An Outline for a Campaign Organization," shows the type of campaign organization suited to the University of Chicago, for the purpose of bringing the appeal to the prospect through the medium of the campaign workers. (See Organization Chart)

Section Three, "A Program of Campaign Publicity," describes a method for bringing the appeal to the prospect through the medium of publicity; defining the purpose of the publicity, and describing the material to be used.

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Section Five, "A Campaign Budget," sets forth the various units of campaign costs, and on the basis of experience in other large campaigns, notably in the cases of Harvard and Northwestern, estimates a campaign expense for the first year, with a conservative margin, at \$168,450.

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II. CONCLUSIONS. The University of Chicago is justified in starting a campaign for \$20,000,000, though in its public aspects the formal announcement will mention only the \$5,000,000 needed at once to complete the medical project.

The University has a large body of alumni, but for various reasons the alumni are not to be considered as an important factor in estimating the probable sources of the contributions. They will undoubtedly furnish a large body of interested workers, and should make a much better record as a group than the alumni of Northwestern University - which offers the closest and most recent parallel. However, it should be considered that the campaign with the alumni is undertaken largely for the sake of the future, as a matter of alumni education toward future needs and toward a plan for a permanent Alumni Fund.

In general type, the University of Chicago campaign will be a campaign for large gifts, extended over a long period of time.

The chief problem is conceived to be a problem of publicity; in the education of Trustees, Faculty, and Alumni, in establishing friendly contacts with Chicago, and in counteracting existing negative impressions in regard to the University's financial position.

If work should begin at once, as it should, it is not considered possible to do a satisfactory piece of work on the general canvass of alumni before

Note: The grand total of estimated expenses exceeds those of the Harvard and Northwestern campaigns by substantial amounts. For a similar period Harvard spent \$147,000 and Northwestern \$136,000. It should be remembered, however, that in the Northwestern campaign the University maintained an additional separate publicity organization at an approximate additional cost of \$40,000 for the period and that Harvard University also conducted extensive publicity work, the expense of which is not included in the campaign total.

II. CONCLUSIONS. The University of Chicago is justified in starting a campaign for

\$20,000,000, though in its public aspects the formal announcement will mention only the \$5,000,000 needed at once to complete the medical project.

The University has a large body of alumni, but for various reasons the alumni are not to be considered as an important factor in estimating the probable sources of the contributions. They will undoubtedly furnish a large body of interested workers, and should make a much better record as a group than the alumni of Northwestern University - which offers the closest and most recent parallel. However, it should be considered that the campaign with the alumni is undertaken largely for the sake of the future, as a matter of alumni education toward future needs and toward a plan for a permanent Alumni Fund. In general type, the University of Chicago campaign will be a campaign for large gifts, extended over a long period of time.

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January 1, 1925. It is believed that the alumni canvass will continue from that point for fully a year; with the effort on special gifts continuing persistently as a permanent feature of the University's promotion.

The John Price Jones Corporation earnestly recommends that the Trustees estimate the size of the campaign job at its full value, and should approach the whole task with the understanding that success will come only after a long, strenuous, and persistent effort. The spirit of a campaign is a very real thing; success or failure may depend on the extent to which the leaders catch the spirit and are able to give it to others. This spirit, so essential, is to feel that the meeting of the needs of the University of Chicago, and setting the University on the path to greater service, will be the most constructive thing that has been done for Chicago, and for the Middle West, within the present generation.

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